NEOGOV PE

How To

Module #4	Employee Performance (Evaluation) Plans
Objective:	This How To focuses on employees and their performance (evaluation) plans.

Pre-Module Requirements

- Employee has received access to the system.

Glossary

- Performance plans can also be called Evaluation Plans.

Steps:

1. In MI HR Self Service, click on the **Performance Management** bookmark.

2. In the Performance Management bookmark are links to the following:

   A. **NEOGOV PE login**
   If you have been provided with an email to access NEOGOV PE, use this link.

   B. **NEOGOV PE instructions**
   For information on how to use NEOGOV PE including an overview of the system, use this link.

   C. **HRMN PM login** (HRMN Performance Management system)
   If you have current plans in the HRMN PM, you will finish your plan there before using NEOGOV PE. Therefore, use this link.

   D. **HRMN PM instructions**
   For information on how to use HRMN PM, use this link.

3. You should have received an **Activate Your NEOGOV PE User Account** email with a link to create your account **Password** using your email address as your **Username**.

   PLEASE NOTE: Current NEOGOV Insight HR Users will use their Insight username and password.

4. Log into the NEOGOV PE site using your **Username** and **Password**. Click on **Sign In >>** button.

5. When you log in, you'll arrive at your **My Dashboard**.

6. Employee performance (evaluation) plan templates will be established for all employees. These templates will include a task to acknowledge the plan. In addition to the acknowledgement task, these templates may also include tasks to self-rate your own plan. You will see these tasks in your **My Tasks** section of the dashboard. Once a task is completed, it is removed from the "current" view of the **My Tasks** section on the dashboard.

   Note: The acknowledgement of plan task will not populate until the performance (evaluation) plan has been started/made ready for review (published) by your manager/supervisor. How to acknowledge a performance (evaluation) plan is covered in module 12.

7. Click on the link for **View All of My Evaluations** or the **Evaluation Card** displaying on the dashboard.
   Note: Only the most recent 3 evaluations will display as evaluation cards on the dashboard. They are sorted by due date in descending order.

8. The performance (evaluation) plan template will be listed in the **Performance Evaluations** section of the page.

9. Click on the plan (evaluation) name.

10. The **Evaluation Detail** page lists i ation specific to your performance (evaluation) plan including name, type (periodic or probation), your name, position, and department/division.

11. The performance (evaluation) plan template will be in **Draft Status** upon receipt and will remain in that status until it is started/ready for review (published).

12. Most agencies have established performance (evaluation) plan dates. The dates you receive will reflect the established dates for your agency or organizational unit including the **Due Date**. (Probationary plans will be covered in a separate module.)

13. The **Overall Rating** will display as Pending until the performance (evaluation) plan review has been completed.

14. If your agency is using a paper performance plan process, you will be notified and provided instructions on using the **Print a Blank Rating Form** function.

15. Changes can be made to objectives and competencies in the plan until the Manager/Supervisor has started/made the plan ready for review (published it).

16. **Objectives** - These are the individual actions that the Manager/Supervisor and employee agree the employee will be rated on in this performance (evaluation) plan for this rating period. Objectives should be SMART (Specific, Measureable, Attainable, Relevant, and Time-Based). Please see your HR Office if you need assistance in creating, or understanding SMART objectives.

17. Employees can edit/add/delete objectives until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the addition of objectives. Other Managers/Supervisors may complete all of the plan updates in PE.

18. If your Manager/Supervisor asks for your assistance in adding objectives to the plan, click on **Add Items** and select **New Objective**. (Department strategic objectives will be available **From Library**. If your department is using this functionality, you will be instructed on what to select from the library. The State of Michigan is not using objectives **From Class Specification**.)

19. The **Add Objective** box will appear.

20. Add an objective in **Title**.

21. **Enter a Description** to ensure both the employee and manager/supervisor are clear on what the objective is intended to achieve and how it will be measured.

22. Select an **Objective Category** for the objective. Most objectives will be categorized as **Employee**. Objective categories are outlined below:

    - **Employee** objectives are associated with the employee's activities for the review (evaluation) period.
    - **Department** objectives are associated with the department’s strategic plan, mission, vision, etc.
    - **Strategic** objectives are associated with the initiatives, projects, business plan, etc.

23. Repeat these steps for all additional objectives.

24. Each objective is accompanied by a **Progress** slider bar, which you may use to update the % complete for that objective. Reports may also be run by Manager/Supervisors on this information.

25. To **Edit** an **Objective** click on the **pencil** icon. NOTE: Only objective added as “New Objectives” can be edited (Objectives added from the Library are not editable).

26. **Update/Edit** the applicable fields and then click on **Save**.

27. Objectives can be updated, added or deleted. To delete an objective, click on the “X” icon in the **Actions** column. The system will prompt you to confirm the deletion of the objective. To add an objective, repeats steps 18-22 in this module.

28. **Competencies** are assigned to the performance (evaluation) plan template based on ECP (Equitable Classification Plan) Group. All ECP Group competencies associated with the job classification will default into the plan.

29. Employees can add/delete competencies until the performance (evaluation) plan is started/ready for review (published). Some Managers/Supervisors may solicit employee assistance in the deletion or addition of competencies. Other Managers/Supervisors may complete all the plan updates in PE.

30. After review and discussion with your Manager/Supervisor, the competencies that will not be evaluated (rated) in this review (evaluation) period should be deleted by clicking on the “X” icon in the **Actions** column. The system will prompt you to confirm the deletion of the competency.

31. Two options exist to add competencies back to the performance (evaluation) plan.

    - Click on **Add Items** and select **From Library**.
    - Click on **Add Items** and select **From Class Specification** (see step #38).

32. The Library will list all competencies for all Groups.

33. If you do not know your Group, you can find the information in the Compensation Manual. The Compensation Manual is available on the Civil Service Commission (intranet) Insider under Top 10 Links or on the Civil Service Commission home page (internet) under MCSC Quick Links.

34. Click on Section A in the Compensation Manual.

35. Locate your HRMN Position Description (job classification) and review the information in the Job Class column. CL1 is Group 1; CL2 is Group 2; CL3 is Group 3 (there is a Group 3 Manager/Supervisors and a Group 3 Supervisors); CL4 is Group 4.

36. Select the appropriate competency by clicking in the checkbox in front of it and clicking on **Assign**.

37. The competency is added back to the performance (evaluation) plan.

38. The other option for adding a competency back to a performance (evaluation) plan is to click on **Add Items** and select **From Class Specification**.

39. Selecting **From Class Specification** will add <u>all</u> competencies associated with the Group back onto the performance (evaluation) plan. (Deleting competencies is covered in step #30 above.)

40. **Plan Acknowledgements** are defaulted via the performance (evaluation) plan template. The acknowledgement is used to have an employee and/or manager certify that they have seen and reviewed the objectives and competencies assigned in the performance (evaluation) plan that will be used for the current rating period.

    Note: The plan acknowledgement task is not available to an employee until the performance evaluation is started/ready for review (published).

    How to acknowledge a performance (evaluation) plan is covered in module 12

41. Self/Peer Ratings can be used to assign a self/peer rating to the performance (evaluation) plan. This is typically assigned within the performance (evaluation) plan template. Please contact your HR Office to have self/peer ratings added to the plan.

42. The **Rating of Record** is assigned on the performance (evaluation) plan template. Employees *may* be required to conduct a self-rating before the performance (evaluation) plan due date.

    The manager/supervisor is required to rate the employee before the performance (evaluation) plan due date. The manager/supervisor rating due date is 12/31/2015. The manager/supervisor serves as the **Rater of Record**.

43. The **Rating Acknowledgements** are defaulted via the performance (evaluation) plan template. The rating acknowledgement is used to have the employee certify that they have seen and reviewed the performance (evaluation) plan rating for the current rating period.

    How to acknowledge a performance rating is covered in module 13.

44. **Tasks** for the employee's plan acknowledgement, rating acknowledgement, self-rating (if applicable) and the manager/supervisor review will be defaulted into the plan from the performance (evaluation) plan template. These tasks will appear on the associated employee's (and manager/supervisor's) **My Dashboard**.

45. New tasks can be added to the performance (evaluation) plan by clicking on the **Add Task** button.

46. Enter a name in **Assignee**.

47. Enter a subject in **Title**.

48. Enter a **Description** if necessary.

49. Select a **Due Date** from the calendar.

50. **Email Notifications** can be set prior to the task due date or after.

51. Click on **Save** or **Cancel**.

52. **Notes & Attachments** can be added to the performance plan using the **New** button.

53. Notes can be typed directly. Some formatting including spell checker is available. They can also be attached by using the **+Attachment** button. If **Private Note** is checked, only you as the employee can see the note.

54. **Audit trail** will document when changes are made **Objectives**, **Competencies**, any fields within **Edit Employee Evaluation** (Evaluation type, Due Date, Evaluation Name, Numeric Scoring, Overall Rating, and Overall Rating Scale) and each time the performance (evaluation) plan is reverted to draft status/made ready for review (Published).

55. When the performance (evaluation) plan is complete, the Manager/Supervisor will start/make the evaluation ready for review (publish). Once the plan is started/ready for review (published), changes cannot be made to the plan (unless reverted to draft status).

56. After the performance (evaluation) plan is started/ready for review (published), an email is sent to you regarding the **Acknowledgement of Plan**. After your acknowledgment of the plan (if additional acknowledgements are not required), a **Rate** star appears for the manager meaning that the plan is available for rating. (a rate star will only populate for you if a self-rating is assigned to the evaluation).

57. Once ready for review, the **Status** of the performance (evaluation) plan changes from **Draft** to **Not Started**.

58. The performance (evaluation) plan can now be printed using the **Print** feature.

59. Click on **My Dashboard or the NEOGOV Icon**.

60. If a self-rating has been included in your performance (plan) evaluation, you will now notice that

there is a rate star in the **Actions** column in the **My Tasks** section of **My Dashboard.**

61. How to complete a self-rating is covered in module 10.

62. To exit NEOGOV PE, click on **Sign Out**.

Additional Resources:

NEOGOV PE Tutorial
Help & Training available in PE in the drop-down under your name (top right corner)
PE Glossary
For questions on the new system or this job aid, email MCSC-NEOGOV@michigan.gov
For questions on performance management plans, contact your HR Office